

AIR VISITOR CHARACTERISTICS BY ACCOMMODATION

HOTEL ONLY VISITOR

CONDOMINIUM ONLY VISITOR

CRUISE SHIP VISITOR



AIR VISITOR CHARACTERISTICS BY ACCOMMODATION

HOTELS ONLY: the number of air visitors who chose hotels as their only means of accommodation rose (+0.4%) to 3,905,218 visitors or 61.1 percent of the total air visitors to Hawaii in 2002. More domestic visitors (58.1%) than international visitors (41.9%) stayed exclusively in hotels. Over 56 percent were repeat visitors to Hawaii. Nearly 38 percent were true independent travelers while the majority purchased group or package tours. Arrivals from this group of visitors increased on Oahu (+0.2%), Molokai (+44.4%), Lanai (+13.4%) and the Big Island (+1.2%) but declined on Maui (-3.8%) and Kauai (-6.8%) compared to the previous year.

The average length of stay by hotel only visitors was 7.67 days. This group spent the most time on Oahu (6.16 days) followed by Maui (5.93 days), the Big Island (5.15 days), Kauai (4.96 days), Lanai (4.40 days) and Molokai (3.39 days).

Pleasure was the primary reason given by 82.5 percent of all hotel only visitors for their trip to Hawaii. MCI travels comprised 8.8 percent of the total for this group while those who got married or honeymooned in the islands accounted for 14.8 percent (TABLE 30).

CONDOMINIUMS ONLY: Close to 13 percent of all visitors who arrived by air to the islands, or 821,834 visitors stayed exclusively in condominiums in 2002, down 5.8 percent from the previous year. Most (91.4%) traveled to Hawaii for pleasure. The majority (82.8%) came from the domestic market while 70.5 percent were true independent travelers. Over half (51.9%) visited Maui, 33.4 percent visited Oahu, 17.4 percent visited Kauai while 15.3 percent visited the Big Island.

In general, this group of visitors stayed longer in Hawaii (11.42 days) than their hotel only counterpart. Condominium-only visitors spent the most time on Maui (10.0 days), followed by the Big Island (9.53 days), Oahu (9.02 days), Kauai (8.75 days), Molokai (6.17 days) and Lanai (4.16 days) (TABLE 31).

CRUISE SHIPS: The number of air visitors who came to board cruise ships touring the islands climbed (+41.6%) to 192,281 visitors and comprised 3.0 percent of all visitors who came by air in 2002. The surge in arrivals and a longer average length of stay (+1.8% to 9.75 days) contributed to a 44.2 percent jump in visitor days. Over 89 percent of the cruise passengers came from the domestic market while the remainder were from foreign countries. More than half (53.6%) were first-time visitors to Hawaii. In addition to cruise ships, 45.6 percent of the passengers also stayed in hotels (TABLE 32).

FIGURE 8: 2002 Visitor Arrivals by Accommodation

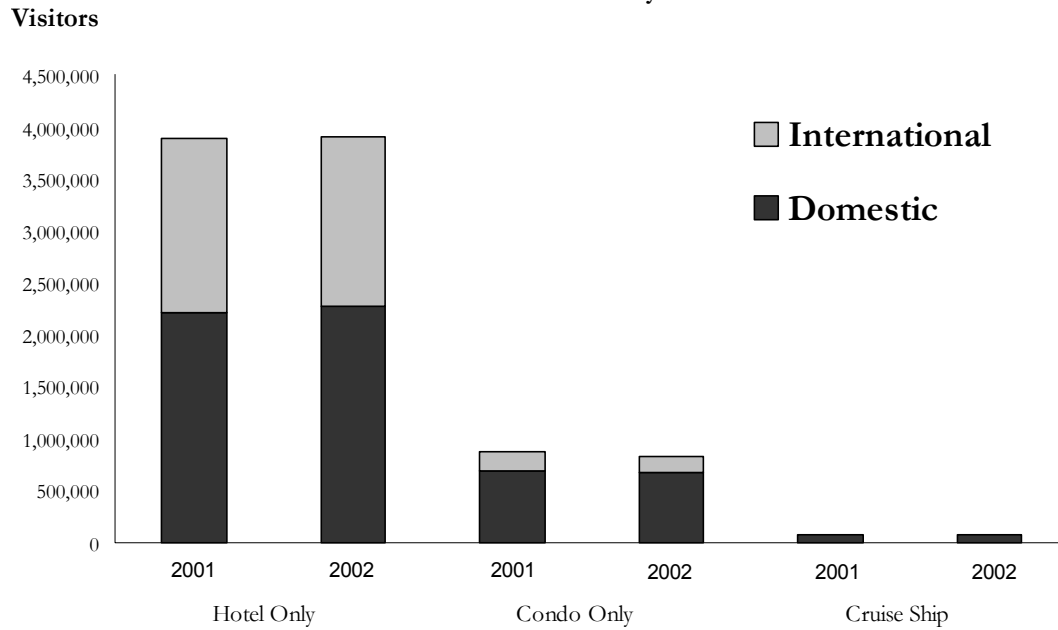


FIGURE 9: Length of Stay by Accommodation: 2002 vs. 2001

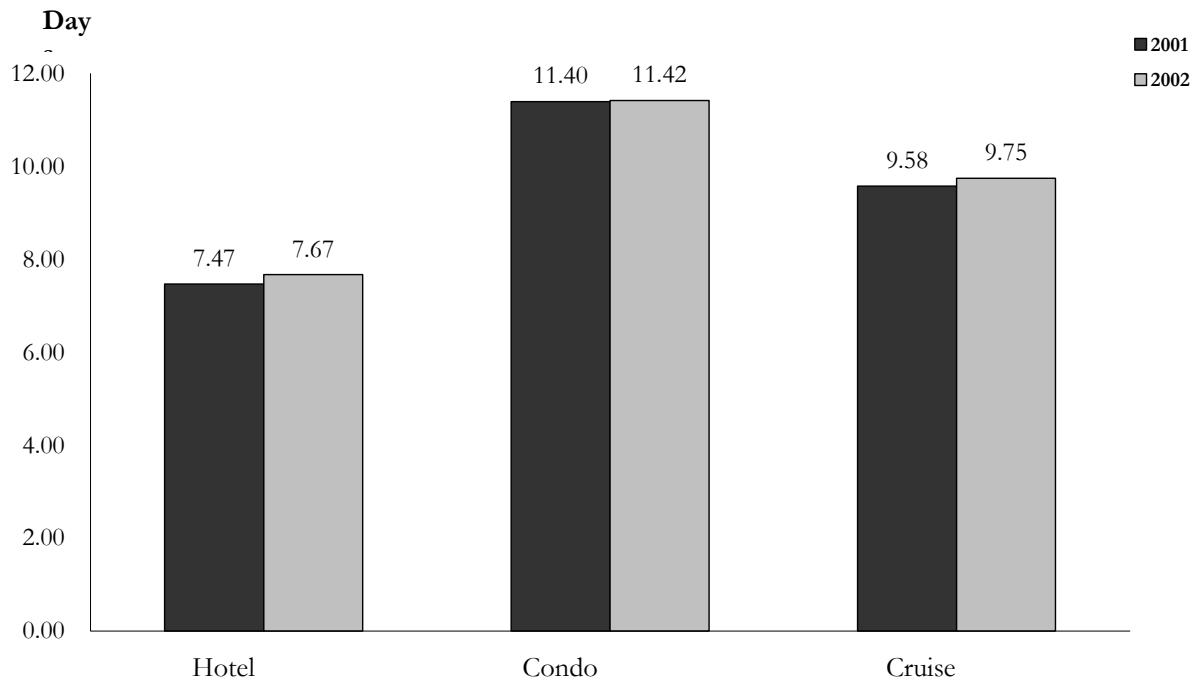


TABLE 30: Hotel Only Visitor Characteristics: 2002 vs. 2001
(Arrivals by air)

Hotel Only	TOTAL			DOMESTIC			INTERNATIONAL		
	2002	2001	% Change	2002	2001	% Change	2002	2001	% Change
Total Visitor Days	29,958,319	29,055,649	3.1%	20,137,994	19,026,644	5.8%	9,820,325	10,029,005	-2.1%
Total Visitors	3,905,218	3,888,880	0.4%	2,268,341	2,213,039	2.5%	1,636,877	1,675,841	-2.3%
PARTY SIZE									
One	622,532	697,667	-10.8%	472,777	477,195	-0.9%	149,755	220,472	-32.1%
Two	1,525,818	1,590,273	-4.1%	1,029,800	1,029,097	0.1%	496,018	561,176	-11.6%
Three or more	1,756,867	1,600,940	9.7%	765,764	706,747	8.4%	991,104	894,193	10.8%
Avg Party Size	2.25	2.14	5.1%	1.92	1.89	1.6%	2.69	2.46	9.6%
VISIT STATUS									
First-Time	1,701,191	1,754,654	-3.0%	886,886	883,677	0.4%	814,305	870,977	-6.5%
Repeat	2,204,027	2,134,226	3.3%	1,381,455	1,329,362	3.9%	822,572	804,864	2.2%
Average # of Trips	3.84	3.57	7.5%	4.08	4.20	-2.8%	3.50	2.74	27.7%
TRAVEL METHOD									
Group Tour	906,157	950,108	-4.6%	233,258	257,162	-9.3%	672,899	692,946	-2.9%
Package	2,364,069	2,345,882	0.8%	1,010,087	959,143	5.3%	1,353,983	1,386,739	-2.4%
Group Tour & Pkg	832,140	871,538	-4.5%	189,163	209,292	-9.6%	642,977	662,247	-2.9%
True Independent	1,467,132	1,464,429	0.2%	1,214,159	1,206,026	0.7%	252,972	258,403	-2.1%
ISLANDS VISITED									
Oahu	2,954,037	2,948,215	0.2%	1,397,579	1,369,295	2.1%	1,556,458	1,578,920	-1.4%
Maui County	1,099,959	1,133,495	-3.0%	854,012	846,531	0.9%	245,947	286,964	-14.3%
...Maui	1,061,067	1,102,568	-3.8%	831,472	823,698	0.9%	229,595	278,870	-17.7%
...Molokai	36,996	25,625	44.4%	21,644	16,607	30.3%	15,352	9,018	70.2%
...Lanai	46,752	41,245	13.4%	36,688	34,406	6.6%	10,064	6,839	47.2%
Kauai	433,703	465,569	-6.8%	326,278	340,201	-4.1%	107,424	125,368	-14.3%
Big Island	651,148	643,724	1.2%	405,477	397,811	1.9%	245,671	245,912	-0.1%
...Hilo	203,945	175,164	16.4%	109,887	102,005	7.7%	94,058	73,159	28.6%
...Kona	555,644	567,850	-2.1%	345,736	349,841	-1.2%	209,908	218,009	-3.7%
LENGTH OF STAY									
Oahu (days)	6.16	5.93	3.8%	6.98	6.65	5.0%	5.42	5.31	2.0%
Maui (days)	5.93	5.68	4.4%	6.56	6.34	3.4%	3.63	3.71	-2.3%
Molokai (days)	3.39	3.80	-10.7%	4.16	4.68	-11.2%	2.30	2.16	6.8%
Lanai (days)	4.40	4.78	-7.9%	4.44	5.12	-13.3%	4.29	3.08	39.0%
Kauai (days)	4.96	4.78	3.7%	5.87	5.69	3.2%	2.21	2.34	-5.5%
Big Island (days)	5.15	5.14	0.1%	6.23	6.18	0.9%	3.35	3.47	-3.4%
...Hilo (days)	2.88	3.22	-10.3%	3.72	3.87	-3.9%	1.91	2.30	-17.2%
...Kona (days)	4.97	4.80	3.6%	6.13	5.90	3.9%	3.06	3.04	0.9%
Statewide (days)	7.67	7.47	2.7%	8.88	8.60	3.3%	6.00	5.98	0.3%
ACCOMMODATIONS									
Hotel	3,905,218	3,888,880	0.4%	2,268,341	2,213,039	2.5%	1,636,877	1,675,841	-2.3%
...Hotel Only	3,905,218	3,888,880	0.4%	2,268,341	2,213,039	2.5%	1,636,877	1,675,841	-2.3%
PURPOSE OF TRIP									
Pleasure (Net)	3,221,929	3,131,386	2.9%	1,752,558	1,688,652	3.8%	1,469,371	1,442,734	1.8%
...Honeymoon/Get Married (Net)	576,706	410,660	40.4%	183,201	175,290	4.5%	393,505	235,370	67.2%
MC&I (Net)	344,221	360,765	-4.6%	269,919	280,907	-3.9%	74,302	79,858	-7.0%
.....Convention/Conf.	203,646	208,796	-2.5%	172,577	169,559	1.8%	31,069	39,237	-20.8%
.....Corp. Meetings	68,785	82,358	-16.5%	52,979	66,104	-19.9%	15,806	16,254	-2.8%
.....Incentive	78,880	74,191	6.3%	49,402	48,325	2.2%	29,478	25,867	14.0%
Other Business	164,015	150,528	9.0%	133,472	125,871	6.0%	30,543	24,657	23.9%
Visit Friends/Relatives	107,725	82,551	30.5%	79,734	60,531	31.7%	27,991	22,020	27.1%
Government/Military	62,032	45,386	36.7%	45,521	33,912	34.2%	16,511	11,475	43.9%
Attend School	8,575	7,012	22.3%	3,428	3,420	0.2%	5,147	3,591	43.3%

TABLE 31: Condo Only Visitor Characteristics: 2002 vs. 2001
(Arrivals by air)

Condo Only	TOTAL			DOMESTIC			INTERNATIONAL		
	2002	2001	% Change	2002	2001	% Change	2002	2001	% Change
Total Visitor Days	9,385,671	9,941,476	-5.6%	7,983,324	7,840,827	1.8%	1,402,347	2,100,649	-33.2%
Total Visitors	821,834	872,162	-5.8%	680,772	688,495	-1.1%	141,062	183,667	-23.2%
PARTY SIZE									
One	105,799	120,914	-12.5%	93,908	101,431	-7.4%	11,891	19,483	-39.0%
Two	316,250	337,168	-6.2%	276,932	288,014	-3.8%	39,317	49,154	-20.0%
Three or more	399,785	414,080	-3.5%	309,931	299,050	3.6%	89,854	115,030	-21.9%
Avg Party Size	2.30	2.26	1.8%	2.20	2.15	2.3%	2.76	2.65	4.2%
VISIT STATUS									
First-Time	191,333	213,060	-10.2%	157,673	163,894	-3.8%	33,660	49,166	-31.5%
Repeat	630,501	659,102	-4.3%	523,099	524,601	-0.3%	107,402	134,501	-20.1%
Average # of Trips	5.78	5.63	2.6%	5.65	5.85	-3.4%	6.37	4.80	32.6%
TRAVEL METHOD									
Group Tour	32,996	43,986	-25.0%	11,757	15,773	-25.5%	21,239	28,213	-24.7%
Package	235,843	254,803	-7.4%	186,736	179,721	3.9%	49,107	75,082	-34.6%
Group Tour & Pkg	26,232	35,641	-26.4%	8,830	11,682	-24.4%	17,402	23,959	-27.4%
True Independent	579,227	609,015	-4.9%	491,109	504,683	-2.7%	88,118	104,331	-15.5%
ISLANDS VISITED									
Oahu	274,573	318,663	-13.8%	174,188	195,082	-10.7%	100,385	123,581	-18.8%
Maui County	434,100	454,748	-4.5%	394,188	385,277	2.3%	39,912	69,471	-42.5%
...Maui	426,634	447,965	-4.8%	388,373	379,682	2.3%	38,261	68,284	-44.0%
...Molokai	10,983	12,461	-11.9%	9,240	7,151	29.2%	1,744	5,310	-67.2%
...Lanai	8,378	8,202	2.1%	6,931	6,228	11.3%	1,447	1,975	-26.7%
Kauai	143,091	155,203	-7.8%	131,234	138,415	-5.2%	11,857	16,788	-29.4%
Big Island	125,977	125,804	0.1%	105,940	107,662	-1.6%	20,037	18,142	10.4%
...Hilo	25,534	24,388	4.7%	19,421	18,439	5.3%	6,114	5,950	2.8%
...Kona	114,060	112,287	1.6%	96,361	98,586	-2.3%	17,699	13,701	29.2%
LENGTH OF STAY									
Oahu (days)	9.02	9.32	-3.3%	9.36	9.01	3.8%	8.43	9.81	-14.1%
Maui (days)	10.01	9.73	2.9%	10.03	9.74	2.9%	9.82	9.67	1.6%
Molokai (days)	6.17	5.74	7.5%	6.47	7.96	-18.6%	4.57	2.76	65.6%
Lanai (days)	4.16	5.88	-29.3%	4.42	7.11	-37.9%	2.92	2.01	45.4%
Kauai (days)	8.75	8.44	3.7%	9.01	8.67	3.9%	5.93	6.51	-8.9%
Big Island (days)	9.53	9.23	3.3%	10.08	9.84	2.4%	6.61	5.56	19.0%
...Hilo (days)	4.65	5.39	-13.7%	5.41	6.03	-10.3%	2.23	3.39	-34.2%
...Kona (days)	9.48	9.14	3.8%	9.99	9.62	3.8%	6.72	5.64	19.0%
Statewide (days)	11.42	11.40	0.2%	11.73	11.39	3.0%	9.94	11.44	-13.1%
ACCOMMODATIONS									
Condo	821,834	872,162	-5.8%	680,772	688,495	-1.1%	141,062	183,667	-23.2%
...Condo Only	821,834	872,162	-5.8%	680,772	688,495	-1.1%	141,062	183,667	-23.2%
PURPOSE OF TRIP									
Pleasure (Net)	751,338	792,599	-5.2%	623,864	626,249	-0.4%	127,474	166,350	-23.4%
...Honeymoon/Get Married (Net)	41,267	35,330	16.8%	29,415	29,654	-0.8%	11,851	5,675	108.8%
MC&I (Net)	14,748	18,252	-19.2%	12,408	14,979	-17.2%	2,341	3,274	-28.5%
.....Convention/Conf.	10,225	12,498	-18.2%	8,643	10,659	-18.9%	1,582	1,839	-14.0%
.....Corp. Meetings	3,059	4,087	-25.1%	2,833	3,261	-13.1%	226	826	-72.7%
.....Incentive	1,642	1,758	-6.6%	1,110	1,131	-1.8%	532	627	-15.1%
Other Business	19,070	17,634	8.1%	17,310	15,186	14.0%	1,760	2,448	-28.1%
Visit Friends/Relatives	32,447	27,077	19.8%	27,097	24,251	11.7%	5,350	2,825	89.4%
Government/Military	3,458	2,535	36.4%	2,615	2,060	26.9%	843	474	77.7%
Attend School	1,996	1,008	98.1%	840	588	42.9%	1,156	420	175.3%

Source: DBEDT

**TABLE 32: Cruise Ship Visitor Characteristics^{1/}: 2002 vs. 2001
(Arrivals by air)**

Cruise Ship	TOTAL			DOMESTIC			INTERNATIONAL		
	2002	2001	% Change	2002	2001	% Change	2002	2001	% Change
Total Visitor Days	1,874,425	1,300,176	44.2%	1,662,149	1,111,867	49.5%	212,277	188,309	12.7%
Total Visitors	192,281	135,744	41.6%	170,746	121,472	40.6%	21,535	14,272	50.9%
PARTY SIZE									
One	33,753	23,105	46.1%	29,043	20,219	43.6%	4,710	2,885	63.2%
Two	115,287	79,696	44.7%	103,578	72,948	42.0%	11,709	6,748	73.5%
Three or more	43,241	32,943	31.3%	38,126	28,305	34.7%	5,115	4,639	10.3%
Avg Party Size	1.88	1.91	-1.5%	1.89	1.90	-0.8%	1.82	1.96	-7.4%
VISIT STATUS									
First-Time	102,995	71,936	43.2%	92,643	66,214	39.9%	10,352	5,722	80.9%
Repeat	89,286	63,808	39.9%	78,104	55,258	41.3%	11,182	8,550	30.8%
Average # of Trips	2.58	2.68	-3.7%	2.53	2.55	-0.9%	2.99	3.78	-20.9%
TRAVEL METHOD									
Group Tour	55,343	32,120	72.3%	51,840	30,793	68.3%	3,503	1,327	164.0%
Package	124,719	91,035	37.0%	114,880	86,626	32.6%	9,839	4,409	123.1%
Group Tour & Pkg	48,932	29,201	67.6%	45,789	28,020	63.4%	3,143	1,181	166.1%
True Independent	61,151	41,791	46.3%	49,816	32,074	55.3%	11,335	9,717	16.7%
ISLANDS VISITED									
Oahu	172,191	118,977	44.7%	153,264	106,000	44.6%	18,927	12,976	45.9%
Maui County	126,250	100,177	26.0%	115,393	92,533	24.7%	10,858	7,644	42.0%
...Maui	124,762	98,137	27.1%	114,020	90,665	25.8%	10,742	7,472	43.8%
...Molokai	2,852	14,207	-79.9%	2,428	12,530	-80.6%	423	1,677	-74.8%
...Lanai	5,284	18,677	-71.7%	4,496	17,557	-74.4%	788	1,120	-29.6%
Kauai	104,401	82,398	26.7%	96,648	78,535	23.1%	7,753	3,863	100.7%
Big Island	119,288	89,908	32.7%	109,970	84,542	30.1%	9,317	5,366	73.7%
...Hilo	91,043	76,246	19.4%	85,042	71,462	19.0%	6,000	4,784	25.4%
...Kona	79,306	80,868	-1.9%	71,922	76,869	-6.4%	7,385	3,999	84.6%
LENGTH OF STAY									
Oahu (days)	6.24	5.25	18.9%	6.02	4.50	33.8%	8.00	11.36	-29.6%
Maui (days)	2.29	2.84	-19.3%	2.20	2.78	-20.6%	3.21	3.59	-10.6%
Molokai (days)	5.04	1.56	223.8%	5.53	1.61	243.5%	2.25	1.17	93.3%
Lanai (days)	4.45	1.78	150.6%	4.87	1.78	173.1%	2.08	1.68	23.7%
Kauai (days)	1.80	1.66	8.1%	1.76	1.67	5.5%	2.20	1.46	50.5%
Big Island (days)	2.60	2.59	0.5%	2.50	2.55	-2.2%	3.80	3.13	21.6%
...Hilo (days)	1.73	1.39	24.8%	1.66	1.35	22.8%	2.76	1.94	42.6%
...Kona (days)	1.92	1.57	22.8%	1.86	1.55	19.7%	2.56	1.84	39.5%
Statewide (days)	9.75	9.58	1.8%	9.73	9.15	6.4%	9.86	13.19	-25.3%
ACCOMMODATIONS									
Hotel	87,645	42,251	107.4%	78,705	37,005	112.7%	8,940	5,245	70.4%
Condo	4,032	2,715	48.5%	3,042	1,988	53.0%	990	727	36.1%
Timeshare	2,415	1,342	80.0%	1,610	907	77.6%	805	435	84.9%
Apartment	1,257	324	287.7%	87	220	-60.4%	1,170	104	1025.7%
Bed & Breakfast	1,487	652	128.0%	644	580	11.1%	843	72	1064.8%
Cruise Ship	192,281	135,744	41.6%	170,746	121,472	40.6%	21,535	14,272	50.9%
Friends or Relatives	4,509	998	351.9%	1,958	910	115.1%	2,551	88	2809.9%
PURPOSE OF TRIP									
Pleasure (Net)	176,730	123,333	43.3%	161,169	114,406	40.9%	15,561	8,927	74.3%
...Honeymoon/Get Married (Net)	12,121	5,720	111.9%	9,256	5,282	75.3%	2,864	438	553.4%
MC&I (Net)	4,611	2,422	90.4%	3,815	1,889	101.9%	797	532	49.6%
.....Convention/Conf.	2,137	1,456	46.8%	1,750	971	80.2%	386	485	-20.3%
.....Corp. Meetings	854	413	106.9%	618	386	60.3%	236	27	760.9%
.....Incentive	1,834	597	207.2%	1,655	576	187.2%	178	20	771.5%
Other Business	4,249	1,677	153.4%	3,065	1,589	92.9%	1,184	88	1250.5%
Visit Friends/Relatives	7,166	7,592	-5.6%	3,107	1,665	86.7%	4,058	5,928	-31.5%
Government/Military	890	258	245.0%	671	217	209.4%	220	41	432.0%
Attend School	232	366	-36.6%	210	319	-34.2%	22	47	-53.5%

^{1/} Visitors arrived in Hawaii by air and boarded ships to cruise around the islands.

Source: DBEDT